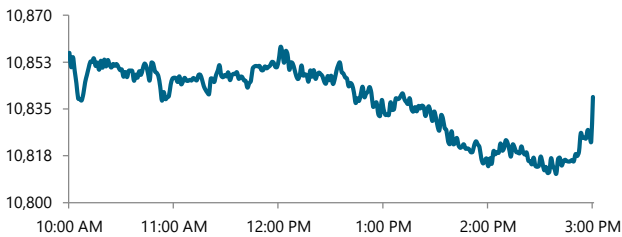


# Daily Markets Overview

30 January 2023

## TASI Intraday



Source: Reuters

## Saudi Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Saudi (TASI)	10,839	0.2	0.2	3.4	17.3
Saudi (NOMUC)	19,179	-0.4	-0.4	-1.2	NA
Energy	5,583	0.3	0.3	2.9	6.7
Materials	6,722	-0.7	-0.7	6.9	11.1
Capital Goods	5,801	0.8	0.8	11.0	11.0
Com. & Prof. Svc	3,574	0.0	0.0	4.0	31.7
Transportation	4,758	0.1	0.1	4.8	NA
Cons. Durables & Apparel	4,468	-0.7	-0.7	5.8	NA
Consumer Services	4,043	0.0	0.0	9.6	NA
Media	22,883	-0.7	-0.7	6.5	25.1
Retailing	7,454	0.0	0.0	3.9	28.5
Food & Staples Retailing	9,234	0.0	0.0	8.1	6.3
Food & Beverages	4,807	0.8	0.8	3.6	29.1
Health Care Equipment	9,409	-0.7	-0.7	3.3	41.4
Pharma, Biotech & Life Science	3,034	-0.5	-0.5	5.6	NA
Banks	11,762	0.7	0.7	1.9	15.3
Diversified Financials	6,175	-1.1	-1.1	-2.9	29.3
Insurance	5,723	1.5	1.5	7.6	NA
Telecommunication	6,574	0.0	0.0	2.9	14.2
Utilities	7,153	-2.0	-2.0	-0.3	21.2
REITs	3,929	0.2	0.2	-1.2	17.2
Real Estate	2,682	1.4	1.4	7.3	NA

Sources: Bloomberg, Reuters, Tadawul

## Top 5 Gainers

Company	Last Close	% Change	Value (SAR mn)
Fawaz Abdulaziz AlHokair Co.	17.64	10.0%	36
Abdulmohsen Alhokair Group for Tourism and Development	24.76	7.7%	36
Halwani Bros Co.	57.80	7.6%	30
Knowledge Economic City	12.08	6.3%	11
Al Sagr Cooperative Insurance Co.	16.14	5.4%	13

Source: Tadawul

## Upcoming General Assembly Meetings

Company	Date
Saudi Cable Co.	6-Feb-23
Salama Cooperative Insurance Co.	8-Feb-23
Allianz Saudi Fransi Cooperative Insurance Co.	8-Feb-23
International Company for Water and Power Projects	12-Feb-23
Wafrah for Industry and Development Co.	13-Feb-23
National Agriculture Marketing Co.	13-Feb-23

Source: Tadawul

## Saudi Market Update

- TASI closed 0.2% higher at 10,839, while NOMUC decreased 0.4% to 19,179 on Sunday. TASI traded value totaled SAR 3.2bn and averaged SAR 3.8bn over the last 30 days. The five most active stocks (by value) in TASI accounted for 25.2% of the daily traded value.
- MSCI Emerging Markets was closed for trading on Sunday.
- Banks increased 0.7%, while Materials decreased 0.7%. Telecom ended flat. Insurance (up 1.5%) was the best performing sector. Among stocks, Fawaz Abdulaziz AlHokair Co. (4240/CENOMI AB), Abdulmohsen Alhokair Group for Tourism and Development (1820/AATD AB), and Halwani Bros Co. (6001/HB AB), led the gainers.
- The Ministry of Commerce revealed that it issued 4,115 commercial registers to GCC and foreign companies last year. It added that a total of 365 registers were issued to GCC retailers mostly selling fitness equipment, fishing gear, bicycles, and fitness wear, while 3,750 commercial registers were issued to foreign companies operating in the fields of general construction, mainly residential buildings and construction activities for non-residential buildings, including schools, hospitals and hotels. (Source: Argaam)
- The State Properties General Authority revealed that the real estate rental law and its implementing regulations will enter into force on February 2. It added that the new law and its implementing regulations replace the State Rental and Evacuation of Real Estate Law and its implementing regulations and aim to regulate the process of state leasing real estate through government agencies according to its needs, as well as rationalizing the financial costs of renting. (Source: Argaam)
- Fawaz Abdulaziz AlHokair Co. (4240/CENOMI AB) announced that it has identified 26 non-strategic brands as part of the sales program. It added that the brands earmarked for disposal will have an expected revenue impact of nearly SAR 288mn (USD 76.7mn), with a positive profitability impact of SAR 25mn (USD 6.7mn) accruing as the divestment program is completed. (Source: Argaam)
- Saudi Arabian Mining Co. (1211/MAADEN AB) inked an agreement with OffWorld, an Artificial Intelligence (AI)-powered industrial swarm robotic mining systems, to further explore the potential of utilizing smart robots in Ma'aden's mines. The company added that these robotic mining swarms will usher in a new era of zero-carbon footprint mining with no people in harm's way and will revolutionize the processing of minerals in the mine itself. (Source: Trade Arabia)
- Saudi Arabian Amiantit Co. (2160/SAAC AB) narrowed net losses after Zakat and tax to SAR 8.8mn (USD 2.3mn) in 2022, from SAR 171.3mn (USD 45.6mn) in the previous year. The company added that the net losses decreased due to the continued sales growth, as revenues rose by 16% Y/Y following an increase in the volume of new orders. (Source: Argaam)

## Top 5 Losers

Company	Last Close	% Change	Value (SAR mn)
Development Works For Food	165.80	-3.3%	20
International Company for Water and Power Projects	150.80	-3.1%	39
Saudi Industrial Investment Group	24.26	-2.8%	18
Tihama Advertising & Public Relations Co.	93.80	-2.8%	19
Maharah Human Resources Co.	53.40	-2.4%	13

## Most Active Stocks by Value (SAR mn)

Company	Last Close	% Change	Value (SAR mn)
Al Rajhi Bank	82.20	1.6%	244
Saudi Aramco Base Oil Co.	100.40	1.4%	208
Dar Alarkan Real Estate Development Co.	12.68	5.0%	141
The Saudi Arabian Oil Company	33.00	0.3%	113
SABIC Agri-Nutrients Co.	137.80	-1.4%	112

Source: Tadawul

NOTES: (1) Prices as of last trade. Updated as of January 29, 2023

(2) WTD: Week to Date and YTD: Year to Date

# Daily Markets Overview

30 January 2023

## GCC Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Dubai (DFM)	3,329	-0.8	-0.7	-0.2	9.1
Abu Dhabi (ADX)	9,738	-2.6	-4.4	-4.6	26.4
Kuwait (KSE)	7,017	-0.1	-0.1	1.4	22.1
Qatar (QE)	11,154	0.4	0.4	4.4	12.3
Oman (MSM)	4,763	0.2	0.2	-1.9	11.4
Bahrain (BSE)	1,930	0.1	0.1	1.8	8.1
DJMENA Index	705	0.3	0.3	1.8	NA

Source: Bloomberg, Reuters

## Global Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
US (S&P 500)	4,071	0.2	2.5	6.0	19.3
US (NASDAQ 100)	11,622	0.9	4.3	11.0	22.6
UK (FTSE 100)	7,765	0.1	-0.1	4.2	11.1
Germany (DAX)	15,150	0.1	0.8	8.8	12.3
France (CAC 40)	7,097	0.0	1.4	9.6	11.6
Russia (MICEX)	2,189	1.0	1.0	1.6	NA
Japan (Nikkei)	27,383	0.1	3.1	4.9	21.6
Hong Kong (HSI)	22,689	0.5	2.9	14.7	13.4
South Korea (KOSPI)	2,484	0.6	3.7	11.1	12.4
China (SHCOMP)	3,265	0.0	0.0	5.7	14.3
India (NIFTY)	17,604	-1.6	-2.3	-2.8	23.3
Brazil (IBOV)	112,316	-1.6	0.2	2.4	6.1
Turkey (BIST 100)	5,192	-0.7	-5.4	-5.8	6.8
Egypt (EGX30)	16,791	0.0	4.5	15.0	10.4
MSCI Emerging Markets	1,051	-0.1	1.4	9.9	13.0
MSCI World	2,786	0.3	2.2	7.0	17.8

Source: Bloomberg, Reuters

## Commodities Prices

Index	Last Close	1 Day %	WTD %	YTD %	1 Year %
Brent Crude (\$/bbl)	86.7	-0.9	-1.1	0.9	-3.0
Natural Gas (\$/mmbtu)	2.8	0.0	-10.2	-36.3	-31.2
Gold (\$/oz)	1,928	-0.1	0.1	5.7	7.3
Silver (\$/oz)	23.6	-1.3	-1.4	-1.5	3.7
Platinum (\$/oz)	1,016	-0.6	-2.9	-5.5	-1.0
Copper (\$/t)	9,242	-0.7	-0.7	10.5	-6.0
Zinc (\$/t)	3,439	-2.0	0.1	14.5	-5.9
Lead (\$/mt)	2,207	0.4	3.0	-5.5	-5.3
Wheat (\$/bu)	750	-0.3	1.1	-5.3	-4.2
Corn (\$/bu)	683	0.1	1.0	0.7	18.9
Sugar (\$/lb)	21.0	1.4	6.3	4.6	14.5

Source: Bloomberg

## Interest Rate Watch (3M Interbank Offer Rate, %)

Country	Last Close	1 Day Change	YTD Change	Spread*
US	4.83	0.02	0.06	0.00
Saudi Arabia	5.46	0.01	0.12	0.64
UAE	4.77	0.00	0.46	-0.06
Kuwait	4.19	0.06	0.19	-0.64
Qatar	5.35	0.00	0.07	0.52
Bahrain	6.14	0.00	0.00	1.32

Source: Reuters

### NOTES:

(1) Prices updated as of January 27, 2023 (2) WTD: Week to Date; YTD: Year to Date; NA: Not Applicable, \*Spread = US 3M Rate – Country 3M Rate

## GCC & Global Markets Update

- Global markets were closed for trading on Sunday.
- Asian markets are trading mixed on Monday. China is up 0.7%, while Japan is down 0.1%, respectively. South Korea, Hong Kong and India are trading 1.2%, 1.7% and 0.1% lower, respectively, in the morning session.
- UAE market was closed for trading on Sunday. GCC markets (excluding the UAE market) ended mostly higher on Sunday. Kuwait fell 0.1%, while Qatar rose 0.4%. Oman and Bahrain closed 0.2% and 0.1% higher, respectively.
- The UAE-based clean energy company Masdar's JV with French energy firm EDF, Emerge, inked an agreement with Coca-Cola Al Ahlia Beverages, the soft drink brand's bottler and distributor in the country, to set up a 1.8 MWp solar photovoltaic plant for its Al Ain facility. As per the deal, Emerge will provide a full turnkey solution, including the design, procurement and construction, for the solar project as well as providing the operation and maintenance of the plant for 25 years. (Source: Zawya)
- Oman's OQ Group announced commissioning of the Bisat oil field located at Block 60 concession area in Abu Butabul. It added that the oil field comes as part of OQ's contribution to supporting the government's efforts to maximise use of Omani natural resources and enabling national companies to manage operations in oil exploration and production sector. This resulted in raising the company's share of total oil production in the country to 220,000 barrels per day. (Source: Zawya)
- According to reports, the UAE's Emirates Global Aluminium (EGA) supplied 203,000 tonnes of waste to other industries as feedstock in 2022. It added that the amount was almost double the volume EGA generated during 2022, reducing stockpiles from previous years, and a 40% increase on 2021 as industries recovered from Covid-19. The re-use diverts waste from landfill and reduces need to exploit new natural resources, contributing to the development of a circular economy. (Source: Zawya)
- Dubai Electricity and Water Authority (DEWA) revealed that it inaugurated 17 new substations in 2022. It added that these include fifteen 132kV stations with a conversion capacity of 2,280 megavolt amperes (MVA) and two 400kV stations with a conversion capacity of 4,000 MVA, in Al Qusais Industrial Area 5 and Jebel Ali First. Moreover, DEWA installed 5km of 400kV overhead transmission lines and 247km of 132kV ground cables to connect the substations to the main transmission network. (Source: Zawya)
- Japan unemployment rate for December (prior: 2.5%; consensus: 2.5%) will be announced tomorrow. (Source: Trading Economics)
- UK S&P Global/CIPS Manufacturing PMI for January (prior: 45.3; consensus: 46.7) will be announced on February 1. (Source: Trading Economics)
- Eurozone unemployment rate for the month of December (prior: 6.5%; consensus: 6.5%) will be announced on February 1. (Source: Trading Economics)

# Daily Markets Overview

30 January 2023

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### Saudi Fransi Capital (Closed Joint Stock Company Owned by Banque Saudi Fransi)

Authorized and regulated under Capital Market Authority license 11153-37. The company is operating under commercial registration 1010231217 with a paid up capital of SAR 500,000,000.

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